



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**June 18, 2018**  
**Prepared by Lisa Sheppard, Director**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2016 actuals  
FY 2017 annual targets  
FY 2017 actuals  
FY 2017 actuals as a percentage of annual targets  
FY 2017 actuals as a percentage of FY 2016 actuals  
FY 2018 actuals to date  
FY 2018 annual targets  
FY 2018 actuals as a percentage of FY 2018 annual targets

**The general target is 91.66% for FY 2018, July 1, 2017-May 31, 2018**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

**Data to note:**

▪ **Meals/Nutrition**

- Total meals served are on target for this fiscal year but are now lagging behind this time last fiscal year. The number of home-delivered meals is lower than at this time last year, but the number of congregate meals is slightly higher.
- The number of home-delivered meal clients is substantially below target at 78% and below the number served this time last year. Staff are checking to make sure there is not a data collection problem.
- Increased use of commodities continues to help us keep food costs lower than anticipated.
- Nutrition survey results have been tabulated. 97% of clients are satisfied with the service.

▪ **Transportation**

- Rides are 11% above target for the year at 103%. Dial-A-Ride rides are 6.5% above this time last year.
- Overall rides for the month are up by 821 over May of last year.
- Excluding the GNP commuter, rides for the year are now 2,331 above this time last year.

- Fixed route rides in Kalispell now lag only 4.8% from this time last year. This is down from 7.8% last month and a high of 24% in December. Rides on the Kalispell morning route through May of this year actually exceeded rides on that route through May of 2017.
- If we reach 7,518 rides in June, we will end the year with a record 100,000 rides. We have exceeded that number of monthly rides for each of the last 5 months. No matter what, we will top the previous record of 94,535 rides set in FY 2014.
- Although the number of Dial-A-Ride rides is up from last year, the number of unduplicated riders is down. We will probably not hit our target for the year or serve as many riders as last year.
- **Information/Referral and Assistance**
  - At 98% of our annual target, we continue to experience a high volume of client calls and requests for assistance, due to an increase in demand for our services as well as state funding cuts to other providers, leaving clients with fewer avenues for assistance. We have revised processes and procedures to achieve greater efficiency but remain limited by the size of our staff and our own budget constraints.
- **Independent Living Services**
  - We continue to be below target for the number of people served and the number of units of service provided for the year as we are managing the 2.5% cut in state funding for the current fiscal year by freezing IL services. We continue to anticipate managing potential cuts in FY 2019 (now expected to be 2.5%) through attrition rather than any suspension of services.
  - The annual IL survey results have been tabulated. 90% of clients who responded are satisfied with their services overall.
- **Benefits Counseling**
  - We've exceeded our target for the year.

## **AOA Administration**

### ***Budget and Contracts***

- We still do not have firm budget allocations for FY 2019 (state or federal funding) but expect a 2.5% cut in state general funds (calculated based on the original budget for the biennium, not from the 2.5% reduction in FY 2018) and an as yet undetermined increase in federal funds based on the federal FY 2018 budget passed by Congress.

### ***Building***

- Punch list update:
  - Outdoor sign
    - David Mitchell has inspected the sign and is arranging for replacement of the peeling letters.
  - The small kitchen freezer is working well, but the large freezer is starting to ice up with the change in temperature/humidity. We had to initiate a service call last week. We are still waiting for additional information about possible system upgrades that could eliminate the remaining problems related to the defrost cycle.
  - We will begin monitoring the temperature in the dry storage area this week for the summer.

### ***HR/Staff Development***

- We have three open positions we are in the process of filling: Assistant Director (1.0 FTE), Cook (.875 FTE) and Bus Driver (.75 FTE).

### **State/Federal/Legislative Issues**

- M4A
  - Lisa participated in the monthly stakeholders meeting with Governor Bullock's staff via conference call.
  - Lisa will attend the Governor's Council on Aging meeting in July.

### **AOA Advisory Council**

- The Advisory Council did not meet in June. The next meeting is July 12<sup>th</sup>.
- Commissioners appointed two new members: Danielle Maiden and Diane Queen Miller.

### **Outreach/Education/Media**

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 5/7/18, monthly KGEZ interview, 11,000
- 5/9/18, presentation to Kiwanis, 8
- 5/8-10/18, AOA Advisory Council meeting in Daily Inter Lake daybook, 15,000
- 5/9-12/18, promotion of Community Shred Event (DIL daybook and display ad, county website, fliers/posters), 15,000
- 5/12/18, Community Shred Event info table, 120
- 5/20-22/18, Medicare 101 class in DIL daybook, fliers and posters, 15,000
- 5/22/18, Medicare 101 class (in Columbia Falls), 2
- 5/22/18, presentation to Whitefish First Baptist Church, 32
- 5/24/18, KGEZ PSA re. Meals on Wheels Drivers needed, 11,000
- 5/31/18, info table at Senior Health Fair at South Campus, 75

### **Age-Friendly Flathead**

- The Steering Committee met on 5/17/18.

### **Eagle Transit**

- Montana Department of Transportation (MDT):
  - 5-Year Transportation Development Planning Grant – July 1<sup>st</sup> changes
    - We've developed new bus schedules, which are in the final proofing stage.
      - Thanks to GIS for creating maps of the routes to print on the back of all of the new schedules.
    - On June 9<sup>th</sup>, we held an all-staff meeting to ensure drivers and dispatchers are prepared for the upcoming route and service changes.
    - We've engaged in extensive outreach to educate the public about the July 1 changes, including radio interviews, TV coverage, print media articles, fliers on buses and posted in strategic locations (primarily in Kalispell) and promotion of two public information meetings at Gateway Community Center. The first meeting was held on Tuesday June 12<sup>th</sup> at 11:00 am (approximately 22 people attended). The second one will be on Wednesday June 20<sup>th</sup> at 4:00 pm.
    - We continue to work with Sherry Stevens at United Way to prepare for new bus entrance/exits at Gateway Community Center (which will be the new transfer stop starting July 1).

- Staff continue to work with the City of Kalispell regarding permitting and installation of bus stop signs. We are asking for a decision by the city council by September 1<sup>st</sup> if at all possible.
  - Committee members will follow-up with city staff from Kalispell, Whitefish and Columbia Falls after July 1<sup>st</sup> to discuss other issues related to the 5-year plan.
- MDT notified us last week they will be auditing our quarterly financial reports for the first three quarters of FY 2018. We have a conference call scheduled on 6/25 to begin the process.
- Outreach/Education/Media/Special Events:
  - The KPAX commercial continues to run on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune.
  - As required by federal regulations, a monthly ad ran in the Daily Inter Lake on 5/16/18.
  - The summer shuttle service and GNP commuter schedule were featured in the Daily Inter Lake's "101 Things to do in the Flathead" publication.
- Operations:
  - Overtime expenditures are under budget, but we continue to rely heavily on contracted employees to fill shifts due to vacant positions and drivers on extended leave.
  - We received one new large passenger bus.
  - Vehicle maintenance costs are at 112% of budget as of the end of May. We have made arrangements to lease two buses for the summer in lieu of making costly repairs to older/high mileage buses to hold us over until we receive additional new buses that are scheduled to arrive shortly.
- Transportation Advisory Committee (TAC)
  - The TAC met on June 7, 2018. The primary topic was the status of the Transportation Development Plan and the July 1 changes.
  - The TAC will meet next on August 2, 2018 and will also take its annual trip to Glacier National Park on August 16, 2018.
- Glacier National Park
  - The hiker/biker season began on Mother's Day weekend and has experienced a 105% increase in riders and a 113% increase in the number of bikes over this time last year.
  - The regular summer shuttle season begins on July 1<sup>st</sup> and will run through September 3<sup>rd</sup>, as will the GNP summer commuter.

### **Nutrition**

- The Older Americans' Picnic on June 15<sup>th</sup> was a huge success. We served approximately 500 older adults plus volunteers. Thanks again to Mark Campbell for letting us use the Expo building at the Fairgrounds.
- Annual survey results for Home-delivered meals: 103 responses
  - Number of meals received a week: 31% every day, 55% 4-5 a week, 14% 3 or fewer
  - Quality of food: 37% very satisfied, 61% satisfied, 2 % not satisfied
  - Service helps client stay at home: 93% yes, 7% no
  - Taste of food: 36% very satisfied, 59% satisfied, 5% not satisfied
  - Volunteer driver only visitor in a day: 14% yes, 49% sometimes, 37% no
  - How long getting service: 29% 1-6 months, 20% 6 months-year, 22% 1-2 years, 28% 2 plus
  - Recommend to a friend: 98% yes, 2% no
  - Rate volunteer drivers: 81% very friendly, 19% friendly, none said not friendly

- 48 comments received
  - 60% expressed gratitude for service
  - 29% expressed a like or dislike for a particular food or food prep.
  - “So blessed to have the meals. Some days that is all I have. Bless the cooks and the drivers. Nice to see a friendly face.”
  - “On low sodium diet and no transportation. Sometimes this is the only decent meal we get for the day. Thank you, we appreciate it!”
  - “Drivers always have a few minutes to visit me and are friendly and happy.”
  - “Thank you for making life a little easier. We are in our 80s and really appreciate it.”
- Annual survey results for congregate meals: 132 responses
  - Quality of food: 56% very satisfied, 42% satisfied, 2% not satisfied
  - Taste of food: 50% very satisfied, 47% satisfied, 3% not satisfied
  - Site Manager friendly and helpful: 97% yes, 2 % no, 2% sometimes
  - Rate volunteers: 85% very friendly, 15% friendly, none said not friendly
  - Improve socialization: 94% yes, 6% no
  - Respondent’s dining site: 67% AOA, 12% Whitefish, 8% Columbia Falls, 8% Lakeside, 5% Bigfork
  - 40 comments:
    - 47% expressed thanks for/enjoyment of the service.
    - 42% expressed a like or dislike for a particular food or food prep.
    - “This place has become very special to me.”
    - “I love coming to the senior center. It gets me out of the house and I get to see all my friends.”
    - “This is really great food/nice friendly people. Thanks. God bless always.”
    - “More dining music and dancing girls.”

#### **I & R/Assistance/Ombudsman/Independent Living Services**

- We have received approximately 12 referrals to date for the VA for the Veteran-Directed Home and Community-Based Services Program
- Independent Living Services:
  - We’ve sent a letter to clients notifying them we are implementing the sliding fee scale at the beginning of FY 2019.
  - Staff are in the process of setting up home visit with all clients to conduct a new needs assessment and screen them for other benefits for which they may be eligible. The screening, called a Benefits Check-Up, will also allow us to determine their cost share rate on the sliding fee scale.
  - Annual survey results: 31 responses
    - On first contact, staff respectful and professional: 100% yes
    - On first contact, staff arranged home visit within 2 weeks: 100% yes
    - At home visit, staff respectful and professional: 100% yes
    - At home visit, staff provided service information: 100% yes
    - At home visit, staff explained next steps: 100% yes
    - Service began within 2 weeks of home visit: 90% yes, 10% no
    - Service is reliable: 90% yes, 7% no, 3% somewhat
    - Satisfied with quality of service: 93% yes, 7% somewhat

- Enough service to meet needs: 78% yes, 22% somewhat
- Service helps to stay in home: 86% yes, 10% no, 3% somewhat
- Aware monthly contribution helps fund service: 97% yes, 3%no
- Overall satisfied with service: 90% yes, 3% no, 6% somewhat
- 15 comments:
  - 53% expressed thanks/praise for service
  - 40% expressed a specific concern.
  - “When I had to give up my car I would have been stranded without the service.”
  - “Thank you for all the care. It makes me feel most of the time life’s worth living. My caregivers are angels. Thank you. You are all just good people.”
  - “I am very impressed with the help you provide. There is no question that it would be hard for me to stay home without it.”
  - “I have terminated my service because they would schedule for a day and time and no one would show up. That happened 3 months in a row.”

### **RSVP**

- Grant update: We received word CNCS plans to officially close the grant this week.

### **Senior Mobile Home Repair**

- The Advisory Board met on 6/13/18. The next meeting will be July 11, 2018 at 10:00 am at Flathead Electric.
- No projects were completed this past month. 27 are in progress; 11 need assessment; 31 are on the waiting list.
- The program received a \$1000 donation from the Flathead Community Foundation.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- The theme for the Older Americans’ Picnic on June 15<sup>th</sup> was “Getting Together with Friends – A Salute to Senior Centers.” Each center had an information table at the event and presented on their activities and events as part of the program.

# June 2018 Report: Performance Measures Tables - May 2018 stats (FY 2018)

91.66%

MEASURE	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 2017 as % FY 2016	May	Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
# Receiving Independent Living Services	447	400	178	45%	40%	2	108	110	233	47%
# Receiving Meals on Wheels	471	450	470	104%	100%	11	351	362	465	78%
# Seniors Receiving Congregate Meals	867	980	1,785	182%	206%	65	1,273	1,338	1,000	134%
# Eagle Transit DAR Unduplicated Riders	502	500	401	80%	80%	10	320	330	500	66%
% of Service Recipients at Moderate to High Risk of Institutionalization	94%	88%	89%	101%	95%	90%	89%	90%	88%	102%
Per Meal Cost of Nutrition Services	\$6.30	\$6.50	\$6.89	106%	109%	\$6.15	\$5.98	\$6.15	\$6.75	91%
% Overall Satisfaction with AOA Services from Annual Survey	N = 98%, IL = 95%	95%	N=99% IL=96%	100%	100%	N=97% IL=90%	0%	N/A	95%	
Maximum annual number of transportation complaints	27	36	30	83%	111%	2	8	10	36	28%
WORKLOAD INDICATOR	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 17 as % FY 16		Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
Outreach/Education/Media						May				
Public Outreach/Education/Media Efforts	153	120	123	103%	80%	10	98	108	120	90%
Nutrition						May				
Total Meals	78,541	82,000	82,428	101%	105%	5,642	67,415	73,057	79,000	92%
MOW	49,283		49,695	N/A	N/A	2,753	39,568	42,321		
Congregate	29,258		32,733	N/A	N/A	2,889	27,847	30,736		
Nutritional Assessments Conducted	1,451	1,550	2,424	156%	167%	89	1549	1,638	1,550	106%
Transportation						May				
Total Ride Count	91,196	94,000	85,305	91%	94%	7,914	84,568	92,482	90,000	103%
Dial-A-Ride Count	30,644	31,020	30,025	97%	98%	2,784	26,337	29,121	30,000	97%
City, Commuter and Other Ride Count	60,552	62,980	55,280	88%	91%	5,130	58,231	63,361	60,000	106%
Eagle Transit Outreach/Special Events	8	10	40	400%	500%	3	32	35	15	233%
Information and Referral/Assistance						May				
Info and Referral/Assistance Contacts	19,586	18,000	17,523	97%	89%	1,292	16,423	17,715	18,000	98%
Independent Living			38%			Apr				77%
Homemaker Units of Service	1,616	3,333	784	24%	49%	247	1376	1,623	2,500	65%
Escorted Transportation Units of Service	1,548	2,186	792	36%	51%	202	1681	1,883	1,739	108%
Respite Units of Service	2,600	3,315	992	30%	38%	106	1662	1,768	2,468	72%
Community Support/Senior Companion Units of Service	1,322	1,090	1,060	97%	80%	106	984	1,090	1,353	81%
Personal Care Units of Service	1,150	465	358	77%	31%	21	173	194	435	45%
Benefits Counseling						May				
Benefits Counseling Hours of Service	N/A	N/A	600	N/A	N/A	35	431	466	450	104%
Ombudsman						May				
Ombudsman consults/cases opened	1454	1,100	1,034	94%	71%	189	988	1,177	1,100	107%